



e-invoicing user guide

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When you log into our e-invoicing portal you'll be presented with the Search / Results screen as shown below:

The screenshot shows the 'Search' screen of the e-invoicing portal. At the top, there's a red header with 'Search', 'Screen: Search', 'Help', 'Log Out', and 'Welcome, S G'. Below the header, there are search filters: Document No., Account No., Legal Entity, Doc. Type, Customer, Invoice Date, and Sort. A 'Search' button is present. The main area displays a table of search results. The table has columns: View, CSV, Document No., Account No., Legal Entity, Doc. Type, Customer, Invoice Date, Pay By Date, Gross Amount, Vat, and Net Amount. A context menu is open over the table, showing options: Display Selected, Save Results, Download CSV, Download TXT, Download Spreadsheet, and View History.

View	CSV	Document No.	Account No.	Legal Entity	Doc. Type	Customer	Invoice Date	Pay By Date	Gross Amount	Vat	Net Amount
		1109405288	0312058001	1000038249	Invoice	Test Account	18/12/2018	08/01/2019	1,725.35	287.57	1,437.78
		1109405120	0030305000	1000038249	Invoice	Test Account	18/12/2018	17/01/2019	438.70	73.11	365.59
		1109405092	0630536001	1000038249	Invoice	Test Account	18/12/2018	08/01/2019	36.37	6.06	30.31
		1109405120	0030305000	1000038249	Invoice	Paragon Test BT Account 00102	18/12/2018	17/01/2019	438.70	73.11	365.59
		1109405092	0630536001	1000038249	Invoice	Paragon Test BT Account 00074	18/12/2018	08/01/2019	36.37	6.06	30.31
		1109405288	0312058001	1000038249	Invoice	Paragon Test BT Account 00270	18/12/2018	08/01/2019	1,725.35	287.57	1,437.78

Here you'll find all the documents you're able to view.

The most recent document will be at the top with older documents below in date order.

Clicking on the icon will deliver back a PDF view of your document.

Clicking on the icon will deliver back a spreadsheet of your document

If you right click in the Result table, another menu will be displayed where you can:

- **Display Selected** - Using standard Windows functionality, you can highlight multiple rows and view them as a single document.
- **Save Results** - allows you to save the complete results set into a spreadsheet file for further analysis.
- **Download** - There are three options for you to download either single or multiple documents.
 - **CSV** - will return you a comma separated text file with each document on a line
 - **TXT** - will return you a pipe delimited text file with each document on a separate line
 - **Spreadsheet** - will return you a spreadsheet with each document on its own tab.
- **View History** - allows you to see the document's history.

Searching for documents

Search Screen: Search Log Out Welcome, Royal Mail

Document No.: Account No.: Legal Entity: Doc. Type: Customer: Sort: [None] ASC

Equals Equals IsEmpty Equals Equals Then [None] ASC

Search Clear

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View	CSV	Document No.	Account No.	Legal Entity	Doc. Type	Customer	Invoice Date	Pay By Date	Gross Amount	Vat	Net Amount
		1802090485	2000308145		Renewal Invoice	Paragon Test BT Account 00503	19/12/2018	18/01/2019	944.40	157.40	787.00
		1802090486	2000308180		Renewal Invoice	Paragon Test BT Account 00504	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802082069	2000380677		Final Notice	Test Account	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802090353	2000072940		Renewal Invoice	Test Account	19/12/2018	18/01/2019	0.00	0.00	0.00
		1802090317	2000006978		Renewal Invoice	Test Account	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802081902	2000078847		Final Notice	Test Account	19/12/2018	18/01/2019	944.40	157.40	787.00
		1802090654	2000381299		Renewal Invoice	Test Account	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802090664	2000385307		Renewal Invoice	Test Account	19/12/2018	18/01/2019	177.00	29.50	147.50
		1802090468	2000307095		Renewal Invoice	Test Account	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802090674	2000388898		Renewal Invoice	Test Account	19/12/2018	18/01/2019	944.40	157.40	787.00
		1802081938	2000253208		Final Notice	Paragon Test BT Account 00297	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802090386	2000132609		Renewal Invoice	Paragon Test BT Account 00404	19/12/2018	18/01/2019	944.40	157.40	787.00
		1802090387	2000132610		Renewal Invoice	Paragon Test BT Account 00405	19/12/2018	18/01/2019	944.40	157.40	787.00
		1802090388	2000132611		Renewal Invoice	Paragon Test BT Account 00406	19/12/2018	18/01/2019	0.00	0.00	0.00
		1802090389	2000132623		Renewal Invoice	Paragon Test BT Account 00407	19/12/2018	18/01/2019	330.00	55.00	275.00
		1802090390	2000132737		Renewal Invoice	Paragon Test BT Account 00408	19/12/2018	18/01/2019	267.00	44.50	222.50
		1802090391	2000133029		Renewal Invoice	Paragon Test BT Account 00409	19/12/2018	18/01/2019	944.40	157.40	787.00

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There are ten fields that can be used to search for documents:

- Document No. The invoice, credit note number of the document
- Account No. Your SAP account number(s)
- Legal Entity No. Your Legal Entity account number(s)*
*You can only search for account numbers that you've registered.
- Doc Type This field has auto-complete and entering inv will bring up 'Invoice', etc.
- Customer You can search for customer names. The 'like' option is useful here.
- Invoice Date The date of the document must be entered in the format dd/mm/yyyy
- Pay-by-date As Invoice Date.
- Gross Amount The gross value of the document.
- VAT Amount The VAT amount of the document.
- Net Amount The net value of the document.

Search Criteria

To assist with searching, each field has a set of search criteria that can be used to help you find the record you're looking for:

Equals	This is the most common criteria used and will return results that exactly match your entry.
NotEquals	Will return documents that do NOT match the data you entered.
Like	Allows you to search for documents that contain the pattern of the data you entered. Inputting 'British' would return both 'British Gas' and 'British Airways'.
In	Here you can search for multiple documents at once. Each item being searched for should be separated by a comma. Eg 12345,23456,34567,45678
IsEmpty	Will return all documents in the selected field that have blank indexes.
List	Similar to 'In'. You can search for multiple documents but this time in list form, as they would be if copied out of a spreadsheet.
From	Used specifically for date or value ranges. When you select 'From' a second box for the 'To' entry will automatically pop-up. Neither field can be left blank.

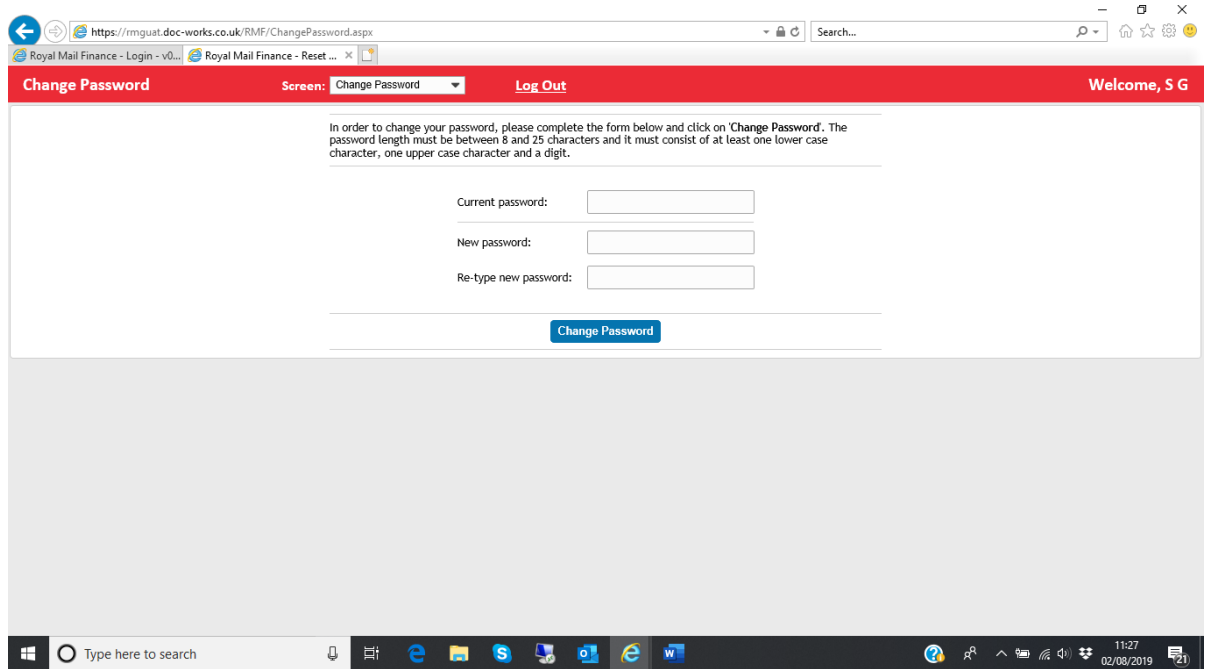
12345
23456
34567
45678

Passwords

All passwords on the system have an expiry period of 90 days.

You will be sent an email when you need to change your password.

However, you can change your password at any time by selecting the 'Change Password' on the screen dropdown.

A screenshot of a web browser displaying the 'Change Password' page. The browser's address bar shows the URL 'https://rmgut.doc-works.co.uk/RMF/ChangePassword.aspx'. The page has a red header with 'Change Password' on the left, 'Screen: Change Password' in the center, and 'Log Out' and 'Welcome, S G' on the right. Below the header, a message states: 'In order to change your password, please complete the form below and click on 'Change Password'. The password length must be between 8 and 25 characters and it must consist of at least one lower case character, one upper case character and a digit.' The form contains three input fields: 'Current password:', 'New password:', and 'Re-type new password:'. A blue 'Change Password' button is located below the 'Re-type new password' field. The Windows taskbar is visible at the bottom of the screen.

You will need to enter your current password correctly and then enter, and re-enter a new password, this must be different from your current one.

Your new password must conform to the required security standards:

- It must be between 8-25 characters in length
- Have at least one upper case letter, at least one lower case letter and at least one number.

The inclusion of specials characters in a password is recommended but is not enforced.